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ESTATE PLANNING QUESTIONNAIRE

Name: _____ Other Names Used: _____

Spouse Name (if any): _____ Other Names Used: _____

Do you have a prenuptial agreement? _____ Prior Marriage(s): _____

Mailing Address: _____

Email Address: _____ Phone Number: _____

Oldest Child's Name and Age: _____

Next Oldest Child's Name and Age: _____

Next Oldest Child's Name and Age: _____

Next Oldest Child's Name and Age: _____

Additional Children and Grandchildren: _____

Please note any children who are adopted or have different parents: _____

Please note any children who have special needs or challenges managing money: _____

Circle any of the following states in which you have lived:

Alaska	Arizona	California	Idaho	Louisiana
Nevada	New Mexico	Texas	Washington	Wisconsin

Describe the sources and amounts of your household income. Please include your occupation and estimate the value of any business ownership. _____

List your real estate and estimate the value of each property. _____

List all life insurance policies, including who is insured and who is the beneficiary. _____

Describe the location, amount, and any joint ownership of each of your bank accounts. _____

Give the locations and amounts of your investment accounts, not including IRA or 401K accounts. _____

List the locations and amounts of your retirement accounts, including IRA and 401K accounts, pension, PERS, etc. _____

Do you own tangible property with a high value or requiring special care? Examples might include art, classic cars, livestock, firearms, etc. _____

Do you expect to inherit money or property, or are you the beneficiary of a trust? Please describe. _____

Do you have a current will or trust? Which? _____

Overall, what do you want to happen to your property after you die? If your heirs die before you do, what would you want to happen? _____

Are there particular gifts of money or items you want to go to specific people? _____

Do you want to make special plans for your pets? Tell us about them. _____

Who should be the executor of your will? _____

Who should be the backup executor? _____

If a minor inherits, who should be the trustee? _____

Who should be the backup trustee? _____

If you are incapacitated, who should handle things? _____

Who is the backup person to handle things? _____

Who should care for your minor children? _____

Who is the backup for your minor children? _____

Place any additional information or comments here: _____

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